



## Process for Submitting an Initiative for Consideration to the QEII Foundation

There are multiple ways for an initiative or idea to be considered for philanthropic investment through the QEII Foundation. For example:

- A grateful patient may wish to donate funds for a specific piece of equipment already included on the Capital Equipment List. This can proceed directly without requiring an administrative approval process.
- Smaller-scale projects (e.g., \$5,000–\$10,000) may be eligible for support through designated funds already earmarked for a particular healthcare area. These may move forward without a formal proposal.

However, larger, strategic initiatives or those requiring significant investment must undergo a more thorough review. This ensures:

- Strategic alignment with the Foundation's fundraising priorities
- Operational readiness and feasibility within Nova Scotia Health (NSH)
- Appropriate prioritization and sequencing at the executive level.

The process below outlines how such initiatives are submitted and reviewed in partnership with the NSH's leadership team.

### Step-by-Step Process

While the following process provides a consistent framework for submitting larger initiatives for consideration, it is important to recognize that each initiative is unique. The Foundation and NSH are committed to working collaboratively and applying flexibility and professional judgment where needed. Factors such as timing, complexity, urgency and donor interest may influence the process. Exceptions or adaptations may be appropriate in certain cases, with mutual agreement between leadership teams.

#### 1. Initial Strategic Initiative Proposal Submission

Initiative Lead (clinical or administrative), QEII Foundation representative or another interest holder completes the submission form that is received by the QEII Foundation.

#### 2. Joint Leadership Review of Proposals

At a joint QEII Foundation and NSH Leadership meeting, initiatives are brought forward for review and discussion.

Based on this joint review, the initiative will follow one of three paths:

- **Ready to Proceed:** If the proposal is sufficiently developed and aligned with organizational priorities and donor interests, it will be accepted in principle and move forward to the Foundation for review of strategic alignment, development of a fundraising strategy and taken to the QEII Foundation Board of Directors for approval to fundraise.

- **Requires Further Development:** If more detail is needed, the Initiative Lead will be asked to complete an Operational Readiness Checklist and obtain full endorsement from NSH clinical and administrative leadership before proceeding.
- **Does Not Proceed:** If the initiative is not aligned with organizational priorities or donor interest, lacks feasibility, or is not an immediate priority, it will not move forward at this time, though it may be reconsidered in the future if conditions change.

### 3. Operational Readiness Checklist and NSH Endorsement (if applicable)

This step is reserved for initiatives that require a more detailed operational and logistical review. It is not applied to every proposal, but only when the QEII Foundation and NSH Leadership determine that additional feasibility assessment is necessary before philanthropic funding can proceed. Projects moving to the Operational Readiness Checklist and endorsement stage must first be approved by the CEO of the QEII Foundation, who will also have the opportunity to include specific questions for consideration as part of the process.

When this step is required, the Initiative Lead will receive the Operational Readiness Checklist from a member of the QEII Foundation or NSH Leadership team. The form must be completed in collaboration with the appropriate operational leads and departments. The process is considered complete once NSH Executive Leadership has formally reviewed and endorsed the initiative through sign-off on the form.

Following this, the completed Operational Readiness Checklist will be reviewed at a QEII Foundation and NSH Leadership meeting. If the proposal is deemed sufficiently developed and aligned with organizational priorities and donor interests, it will be accepted in principle and advance to the Foundation for review of strategic alignment, development of a fundraising strategy and presentation to the Board of Directors for approval to fundraise.

### 4. Accepted in Principle: QEII Foundation Fundraising Strategy and Board of Directors Approval

Once an initiative has been approved in principle by the QEII Foundation and NSH Leadership, the Foundation develops a fundraising strategy and, if required, seeks Board approval.

### 5. QEII Foundation Priority Designation and Campaign Launch

Once an initiative is formally approved as a QEII Foundation priority, the QEII Foundation begins strategic preparation for public and philanthropic engagement. This includes:

- **Case for Support Developed:** Collaborating with initiative leads and stakeholders to build a compelling narrative that outlines the need, impact, and funding requirements.
- **Public Announcement (if applicable):** Coordinated communications and media planning to introduce the initiative to the public, donors, and interest holders.
- **Fundraising Campaign Launch:** Initiation of donor engagement and fundraising activities tailored to the scale, urgency, and strategic importance of the initiative.